

BDDS Portal Provider Training 3:

My Cases / Caseload Assignment

September 25, 2018



Who will I see in the BDDS Portal?

Access to individuals in the BDDS Portal is based on the current & approved Service Plan / NOA.

- If your Agency is a Provider on an individual's Service Plan, your Agency can access the individual.
- When end-dated or removed from a Service Plan, your Agency will no longer access the individual.
- Providers with multiple Agency Locations can access the full roster of individuals who are associated with any one of these locations.

Some users will see an *Assigned Caseload Only* – this is a subset of individuals that were assigned directly to them by another user



How do I access my caseload?

Division of Disability and Rehabilitation Services

Home My Cases Processing Resources Admin

Search by Name, RID, or Portal ID

HOME

Caseload

View : My Cases

Export to Excel

Name ↑	S...	DOB	County	Wa...	Assigned to	Case ...	Case ...	Case Manage...	
BROWN, CHARLIE	3779	10/14/93	Marion	CIH	Jane Doe, Bob Smith, Joe Provider	Montica W...	(317) 828-...	montica@futuresec...	<input type="checkbox"/>

50 items per page 1 - 1 of 1 items

All users have a view of “MY CASES” → cases that are assigned directly to you.

Use Filter  in column headers to find a subset of cases on your caseload.



How do I access All Cases?

Users with All Case(s) Access can ALSO see All Cases that are available to the Agency

HOME
Caseload

To assign or unassign individual(s) to a user's caseload, select them using the checkboxes in the grid below.

View : All Cases Assigned to: [dropdown]

Assign Case(s) Unassign Case(s)

Export to Excel

Name ↑	SSN	DOB	County	Waiver	Agency ...	Assigned to	Case M...	Case M...	Case Manager E...	
--------	-----	-----	--------	--------	------------	-------------	-----------	-----------	-------------------	--

Switch between two views:
All Cases = Agency-wide
My Cases = personal caseload

Use 'Assigned To' dropdown to view cases assigned to a specific user

TIP: Select Unassigned to view cases that aren't assigned to anyone in your Agency

Use Sort/Filter  in column headers to narrow results to a subset of cases.

This is very helpful when there are multiple Agency Locations.



Caseload Assignments

- Assigning individuals to user caseloads is an important way to help staff track their own caseload.
- If a user has Assigned Caseload Only access, they will only see individuals to whom they are directly assigned.
- For users who have access to All Cases, caseload assignment is still important because it will help the user to drill down to a more specific list of individuals for improved tracking.
- Multiple users can be assigned to the same individual.

There are two ways to assign individuals to caseloads

1. Assign Cases from My Cases Menu
2. Assign Cases from Individual Profile



Assign Cases from My Cases Menu

HOME

Caseload

To assign or unassign clients to a user's caseload, select client(s) using the check boxes in the grid below.

View: All Cases Assigned to:

Assign Case(s) Unassign Case(s)

Export to Excel

Client Name ↑	SSN	DOB	County	Waiver	Assigned to	Case Manager	Case Manager Phone	Case Manager Email	<input type="checkbox"/>
BEAGLE, SNOOPY	3532	05/14/63	Marion	CIH	Lisa Jones	Bobby Lamar Young	(513) 801-7706	byoung@indianafsa.com	<input checked="" type="checkbox"/>
BEETHOVEN, SCHROEDER	3665	10/14/56	Marion	CIH	Jane Doe, Lisa Jones	Pamela Ingol	(260) 445-4587	pingol@indianafsa.com	<input checked="" type="checkbox"/>
BROWN, CHARLIE	3779	10/14/93	Marion	CIH	Jane Doe, Bob Smith	Montica White	(317) 828-3746	mwhite@indianafsa.com	<input checked="" type="checkbox"/>
BROWN, SALLY	3143	01/21/87	Marion	CIH	Jane Doe, Lisa Jones	Amanda Mitchell	(317) 460-3182	amitchell@indianafsa.com	<input checked="" type="checkbox"/>

Use the My Cases menu item from the top navigation bar to view and assign cases.

- FIRST use the checkboxes to select individual(s) to assign.
 - You can select multiple individuals at a time or use the column header checkbox to select all. Note: this could be a filtered subset if you've filtered using any column headers.
- Once you've selected the individuals, click 'Assign Cases'



Assign Cases from My Cases Menu

Assign to Caseload ✕

Selected Individual(s)

Name	County	Assigned to	
BEAGLE, SNOOPY		Lisa Jones	Unselect
BEETHOVEN, SCHROEDER		Jane Doe, Lisa Jones	Unselect
BROWN, CHARLIE		Jane Doe, Bob Smith, Joe Provider	Unselect

1 - 3 of 3 items

Assign To

Cancel Save & Assign to Another Caseload Save & Close

Selected individual(s) will be displayed.

Use the 'Assign To' dropdown to select a user whose caseload you'd like to assign the individual(s). Available options only include users that are set-up for your Agency in User Mgmt.



Assign Cases from My Cases Menu

Assign to Caseload ✕

Selected Individual(s)

Name	County	Assigned to	
BEAGLE, SNOOPY		Lisa Jones	Unselect
BEETHOVEN, SCHROEDER		Jane Doe, Lisa Jones	Unselect
BROWN, CHARLIE		Jane Doe, Bob Smith, Joe Provider	Unselect

1 - 3 of 3 items

Assign To

Cancel Save & Assign to Another Caseload Save & Close

To assign individual(s) to:

- *Multiple caseloads*: select 'Save & Assign to Another Caseload.'
 - This can be repeated over and over again.
- *Only one caseload*: select 'Save & Close.'



Assign Cases from My Cases Menu

Assign to Caseload ×

Selected Individual(s)

Name	County	Assigned to	
BEAGLE, SNOOPY		Lisa Jones	Unselect
BEETHOVEN, SCHROEDER		Jane Doe, Lisa Jones	Unselect
BROWN, CHARLIE		Jane Doe, Bob Smith, Joe Provider	Unselect

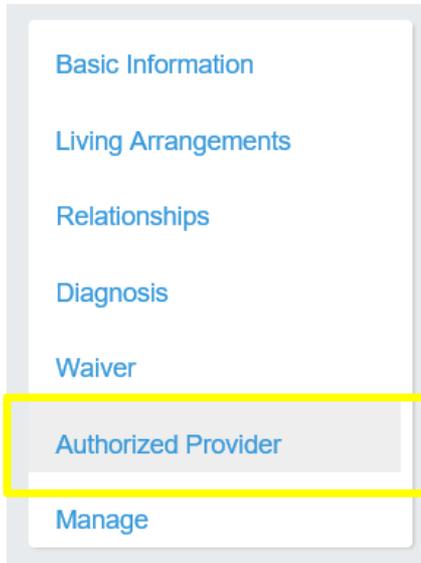
1 - 3 of 3 items

Assign To

If you do not want to assign someone that you selected from the previous *Caseload* grid, use the 'Unselect' button to remove the individual from the selection.



Assign Cases from Individual Profile



Assignments can be made directly from an individual's profile.

To do so, navigate to the Authorized Provider tab.

Then, use 'Assign to Caseload' button located above the *My Provider Agency Caseload Assignments* grid to assign this individual only to user caseloads.



Assign Cases from Individual Profile

Assign to Caseload ×

Selected Individual(s)

Name	County	Assigned to
GOODFRIEND, MARCIE		Unassigned

1 - 1 of 1 items

Assign To

Cancel Save & Assign to Another Caseload Save & Close

Once you've selected a user from the 'Assign To' dropdown, you may choose to 'Save & Assign to Another Caseload' or 'Save & Close.'

At any time, you may also cancel assigning the individual to a caseload by selecting 'Cancel.'



Assign Cases from Individual Profile

[My Provider Agency Caseload Assignments](#) Assign to Caseload Unassign from Caseload

Name ▼

Joe Provider

◀ ◁ 1 ▷ ▶ 50 items per page 1 - 1 of 1 items

You'll automatically be directed back to the Authorized Provider tab of the individual's profile.

Here, you'll see the new caseload assignment in the *My Provider Agency Caseload Assignment* grid.



Unassign Cases

- To unassign cases from a caseload, follow the same instructions as presented to ASSIGN but instead select UNASSIGN.
- When you unassign an individual from a caseload, they will no longer appear on a user's *My Cases* grid.
- If the user has Assigned Cases Only permissions, they will no longer have access to the individual.
- Users with permissions to view *All Cases* -- even when not directly assigned -- will still access the individual and view them in an *All Cases* grid view but they will not appear on their *My Cases* view.



BDDS Portal Trainings

<https://www.in.gov/fssa/ddrs/5437.htm>

- BDDS Portal Provider Training 1: Accessing the BDDS Portal
- BDDS Portal Provider Training 2: User Management (for System Administrators)
- BDDS Portal Provider Training 3: My Cases / Caseload Assignment
- BDDS Portal Provider Training 4: Navigating the Portal
- BDDS Portal Provider Training 5: Individual Profile
- BDDS Portal Provider Training 6: Document Library
- BDDS Portal Provider Training 7: PCISP
- BDDS Portal Provider Training 8: Viewing the Monitoring Checklist
- BDDS Portal Provider Training 9: Viewing Transitions

